

Growing Effective Project Managers:

How to change your project management culture and develop new leaders



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“It is too early in the project for that.”

Hesitancy often exists when planning in the early stages of the project. This is a critical step, however, because the early stages are where risks and issues need to be identified so proper mitigation plans can be put in place. It is important that leaders establish the necessity for these actions to take place early, as well as supporting the inevitable revisions that take place after these early plans have been made.

“That’s not the way I manage projects.”

Resistance to change is common to any attempt to change business processes; project management is no exception. The best way to mitigate this challenge is to communicate clearly and often what is expected, ensure each PM has the tools and knowledge to meet these expectations, and hold each PM accountable to reaching those expectations. While this will not eliminate resistance, it will help manage it.

“This is too much paperwork.”

The first step in addressing this issue is to change the view of project management documentation from superfluous busywork to effective management tools. Streamlining documents so that no additional reports need to be created for formal reviews and status meetings will also help address this concern.

Introduction

Aerospace & Defense (A&D) companies employ some of the best and brightest engineering, IT, and technical talent in order to design and develop some of the most technically advanced machines in the world. Unfortunately, these stars are often promoted to become project managers. While their intelligence does not immediately leave them, contrary to popular belief, they do find themselves requiring an entirely new skill set. Despite a recent focus on project management toolkits and certifications as mechanisms for developing project management skills, the skill gap has not closed. Through engaging with clients on studies and projects ranging from project management assessments to enabling Project Management Offices, it became clear that the reason for this gap is not lack of talent or infrastructure, but a lack of focus on proper project management behaviors.

To address the lack of an effective project management culture, leaders need to take three key actions. First, they must clarify the expectations of their team. Second, they must increase the knowledge base of their PMs. Third, they must demand accountability to established standards.

A case study is presented within each of these principal areas to illustrate how one A&D Company improved the job done by their project managers by building an assessment tool designed to measure PM behavior and provide real-time feedback. Common protests from PMs and responses to them are also listed in sidebars throughout the paper.

Clarify Expectations

“I need a step-by-step guide that tells me how to manage a project.”

– A&D Project Manager, former Engineer

It is a common pitfall to assume that PMs understand what needs to be done to manage a project effectively just because of their title. In reality, PMs may be inexperienced with managing projects, new to an organization, or unfamiliar with specific project management tools and processes. Establishing the expectations of your team allows them to work toward a shared vision of success. Also, by standardizing the set of management tasks and tools, the time needed for tactical project management can be reduced and devoted instead to strategic decision-making. Thus, the quote that first may have seemed unreasonable actually shows your PM taking a valuable step toward improving their performance and efficiency.

Proper and effective communication is the first step toward clarifying expectations within your team. A common advertising rule of thumb is that people need to see an ad at least seven times before they will act on it. This guideline can transfer to other applications; it is not enough to tell your team during one meeting what you expect of them or to post requirements on a Web site no one may check.

Clearly documenting, in writing, what project management behavior is expected is the second step in clarifying expectations. The documented behavior should be given directly to each PM and explained in further detail as necessary. An entry-level PM would focus on one set of behaviors, while an experienced PM may need only targeted guidance. The document must go beyond just technical guides on how to utilize a tool and needs to clearly define what level of detail a project plan should show, as well as how risks should be escalated to senior leadership. Specific points of emphasis should be repeated during staff meetings for all to hear.

The third step toward clarifying expectations is to explain the reasoning behind the instructions. Explaining why certain tasks, such as a communication plan or a risk-mitigation plan, are important will help PMs view these tasks as helpful tools for managing their project as opposed to onerous busywork. This approach can establish informal process champions who help propagate the expected behavior throughout the organization. Clarifying expectations can have some unexpected positive benefits for leadership as well. For example, explaining the intended use of data requested can improve the quality and accuracy of the data harvested.

It is not enough to clarify expectations to your PMs verbally. Effective documentation is also critical in keeping your PMs on track. Without proper documentation, it is impossible for a project to be managed effectively or for an independent observer to determine the status of a project. Documentation focuses on three things:

- having the correct information
- providing, but not mandating, templates
- streamlining the reporting and approval of documents

While standardizing processes and clarifying expectations are critical for developing PMs, it is possible to have too much standardization. When assessing the documentation of your team, requirements should be defined for the information within the document, not the format of the document itself. For example, one PM may be most comfortable managing a project schedule in MS Project while another is more comfortable managing the schedule within a spreadsheet. What is important is that the PM is comfortable with the document and is tracking the required information.

This leads to the larger point that technology is almost never the solution to increasing project management effectiveness. While automated workflow, pre-filled data fields, and searchable databases sound wonderful (and are not without merit), they are useless without the appropriate knowledge and process infrastructure in place. Make available as many sample deliverables as possible as they can reduce or eliminate cycle time associated with document formatting and allow the PM to focus on the content. As noted, however, appropriate training and infrastructure must be in place for PMs to get the most value from these deliverables.

An additional benefit to documenting project status is the forced reflection that occurs. PMs are required to consistently identify important issues and project risks and what is being done to address them. This review forces PMs to engage in higher-level strategic thinking about their projects and is an often overlooked benefit of effective documentation.

Finally, documentation should be as streamlined as possible. One of the biggest challenges (see sidebar) when deploying new project management expectations is that PMs protest that they don't have time to complete additional paperwork. The first step to avoiding this challenge is to communicate that these documents allow the PM to manage projects effectively. Typically, after the project is more than half completed, PMs realize that the time they spent planning early in the project later saved them significant time. Keeping informal status reports for audit and record-keeping purposes and ensuring that documents for any formal project reviews are the same documents the PM uses to manage the project are also important steps in avoiding complaints from PMs about extra paperwork. If a PM complains of extra paperwork because they have to transpose their schedule into a different format for a formal review, then that is legitimate!

Case Study

The IT organization of a major Aerospace and Defense contractor faced multiple issues with their PMs: projects consistently slipped their dates and ran overbudget. The organization consisted of a mix of inexperienced PMs, technical experts who'd been promoted to PM, and veteran PMs resistant to change. To clarify the expectations of each PM, the leadership commissioned Hitachi Consulting to create a tool to assess individual project management behaviors and provide a quantifiable method to track improvement. This was accomplished by creating a Project Management Health Assessment Tool (See picture below). To create the tool, PMs were interviewed to gather feedback on what areas of project management were critical to leading a successful project. This feedback was used to create the tool which helped gain support of the PMs involved. The feedback was also used to identify key behavioral criteria against which PMs would be measured. The criteria were grouped into five key areas of project management:

- Project planning
- Resource management
- Scope control
- Risk management
- Organizational change management

Risk Mitigation Section of the Project Management Health Assessment Tool

Risk Mitigation						
Risks are identified and listed	Early	Y	Project Definition / Plan			
Risks are prioritized by High, Medium, and Low in plan	Early	Y	Project Definition / Plan			
Mitigation plans and closure are documented for each high level risk	Early	N	Project Definition / Plan	Add closure dates to risks	4/28/2009	
Risks are closed by the date identified in the closing plan	Early	Y	Project Definition / Plan			
Lessons learned are tracked from beginning to end of project	Early	Y	Project Definition / Plan			
Risks are reviewed at a minimum of once a week by the project team	Middle	Y	Project Definition / Plan			
		Yellow				

"I'm not performing at 40 percent!"

When setting expectations, there often exists a gap between the actual performance of a PM and their vision of performance. This often occurs because the PM is working 12- to 14-hour days trying to firefight issues that arose because proper project planning did not take place. It is critical to explain what concrete actions need to take place to close this gap and focus on the behavior necessary to fix them. Low scores should be utilized as a teaching point, not as an opportunity for punishment, so long as growth and improvement is observed over.

Each question in the assessment tool focused on the behavior required of the PM rather than on the results of their project. Therefore, "Is the project schedule tracked with completion dates for each individual task?" was asked, as opposed to "Is your project on schedule?" Each PM also completed a self-assessment, thinking critically about how they could improve and providing documentation for all areas. As such, it was not enough for a PM to respond that they managed their risks; they had to have a documented risk-management plan. Scores were reviewed with an independent project management expert, who gave their own rating and suggestions for improvements. PM performance was tracked over time to provide a measurement to judge improvement.

The introduction of this tool resulted in significant positive improvements for the PMs involved. Each completed formal process reviews smoothly because they had actively managed their project documentation. PMs actively managed the risks they'd identified to project success and met the deadlines listed in their project plans. Additionally, more PMs were able to efficiently manage project hurdles because of their advanced planning. While PMs initially resisted the tool (see sidebar), each PM realized the benefits of rigorous project planning and holding themselves to the standard that they had prescribed for others.

Key Points to Clarifying Expectations

- Clearly communicating expectations provides a baseline performance level PMs must meet
- Standardizing project management processes helps PMs strategically manage their projects
- Utilizing effective documentation allows PMs to proactively address any issues and reduce wasted time redoing documents for review
- Focusing on behavior, rather than results, allows for a clearer view of potential problems and targeted solutions to problems

Increase Knowledge

“I’m a network architect, not a Project Manager.” – IT Project Manager

“I already took the PM class.”

Leadership should set expectations that project management, like all fields, is an area where knowledge should continually expand and improve over time and with timely and consistent feedback.

The majority of PMs throughout Aerospace and Defense companies, whether in IT, engineering, or supply chain, reached their position due to their prowess in their specialty, not because of their management ability. No matter how clear expectations are, a PM without the right knowledge will not be able to meet those expectations. To address this gap, leaders need to avoid relying on training seminars and online materials to create a mechanism to provide frequent and consistent guidance for their PMs, and instead provide multiple methods for learning. These actions will expand the base of knowledge for PMs and better drive project success.

While training classes are well-intentioned and contain useful information, they have limited efficacy for several reasons. For one, engagement is often limited because people will check email and attend to daily responsibilities during class. Another problem is that trainers are unable to teach PMs about the specific requirements of their department or functional area, which must be learned on the job. Trainings and certifications can provide false confidence from both the PM and his/her leadership that a PM can start immediately in a role with no external guidance and know exactly what to do because of the certificate. Ultimately, developing leaders is more than simply sending people to a class.

So what can be done to address this problem? The answer lies not in eliminating training, but in developing greater support after training has been completed. This support can be provided with online materials, templates, training guides, checklists, and self-assessments, all available across multiple mediums. Another solution is to establish PM mentoring relationships. This system can be informal or formal, depending on the organizational readiness and culture. An open business culture may be more conducive to an informal system, while a more rigid hierarchy may require a formal system for results to be seen. Mentoring allows for questions to be answered by someone who has been through the same processes and can help explain specific areas a new PM may be unfamiliar with, as well as to provide a new or inexperienced PM with timely and consistent feedback.

Mentorships are not limited to new PMs, although that may be when mentoring is most important and time-consuming. PMs should have mentors as they progress, because as roles become loftier and projects more complex, new challenges will arise that require guidance. Mentorship can also be supplemented with regular learning sessions (within regular staff meetings or independently) to focus on a specific issue with the entire team.

The most common argument against mentorship is a lack of available time and resources. Without a doubt, effective mentorship is time consuming, but this cost must be weighed against the cost of letting inexperienced PMs work independently or with limited oversight. New PMs are more likely to be hesitant

to communicate potential problems and risks within a project, and the resulting snowball effect can take much more time to clean up than would have been devoted to mentoring the same PM. In addition, mentorship provides a method to slowly build up a PM's skills, increasing the complexity of the projects a PM can manage independently.

Case Study, Part 2

Following the completion of the self-assessments, all of the PMs had multiple areas for improvement. Multiple mentoring sessions were conducted, ranging from 30 minutes to two and a half hours. These mentoring sessions were led by an outside project management expert but they could also have been done by a peer expert or senior leader. During these sessions, the mentor explained in greater detail why specific deliverables or information was required, and the potential benefits of completing them.

This individual feedback helped reduce the resistance to change common with attempts to change project management processes or culture. Templates were provided as guiding principles for PMs. In this example, the mentors specifically did not complete any tasks for the PMs, but rather provided information to help them complete the documentation independently. Over time, the mentors gradually reduced the scale of intervention until the PMs demonstrated the expected behaviors from the assessment tool. These PMs then reached a level of understanding where they were able to guide and mentor others in efficient and effective project management.

Key Points to Increasing Knowledge

- Guidance is most effective if given frequently and consistently
- PM training is helpful only when knowledge gained is reinforced with guidance and cycles of learning
- One-on-one mentoring sessions are the most effective way to develop efficient PMs and leaders

Demand Accountability

"I would tell someone else to do that, but I don't think that I need to."
- Senior A&D Project Manager

One of the most difficult steps a leader faces in improving project management practices is changing the entrenched culture within the organization. While dictating what must be done can be effective in the short term, it does not lead to long-term improvements. To truly improve project management behavior in the organization, PMs must have ownership over the changes in the practices of the team.

Most PMs understand what a good PM should be doing and how they should manage their projects. However, from our study, PMs did not act on or did not know how to act on these Best Practices. As the quote shows, some veteran PMs do not feel the need to follow defined methodologies because they feel their experience outweighs the need to follow a standard process.

PMs need to adhere to the standards required by their leadership team to manage their projects. This means that PMs are required to create and manage a project schedule and plan; track budgets and expenses; track issues, action items, and risks; manage their scope and tasks; and complete their self-assessment checklists. Each PM needs to be held accountable for independently managing the project effort, developing all of the project management deliverables, and also providing this information to the leadership team on a

"I've been doing this for 28 years, why should I change now?"

Senior team members can be the most difficult and most important team members to convert when changing a project management culture. It is important to stress how these changes can make their job easier, as well as the fact that their seniority makes it vital that they take a leadership role in developing new PMs. Leadership needs to hold senior PMs accountable for their performance.

"The specific technical /classified/resources challenge means the typical framework doesn't apply."

Every project is unique, and many PMs take this as a reason to exempt themselves from standard management processes. It must be firmly established by leadership that all projects need to meet the same requirements. A last-minute firefighting approach, while common for projects with special challenges, is not a sustainable method for effective project management.

regular basis for status reporting and decision-making. This is the only way for each and every PM to fully comprehend the complexities of their project goals and status.

“I’m not responsible for these areas/I’m waiting on someone else/another department for that.”

Clearly defining the responsibilities of a PM is a key step to improving PM performance. PMs need to be empowered to make decisions and utilize resources that may be spread across a matrixed organization. Expectations must be set that PMs are the final point of project success and are ultimately responsible for the success and failure of the project.

It’s important to note that the leadership team can and should track and measure the performance of their PMs on a regular basis. Using a Project Management Health Assessment (see Case Study below) and reviewing PM documentation by a peer or an outside party, can provide PMs and senior leadership with immediate feedback and guidance on areas for improvement. When their performance is being consistently assessed and they are receiving feedback at consistent intervals, the PM can continue to think critically about their project management performance against concrete standards and see measurable improvement in their performance.

Allowing for failure is a critical step on the path to success. When a PM is truly working to meet expectations and struggling, whether a newly appointed PM, or a PM transitioning to the new project management culture, being overly critical can derail the change process and alienate a PM. On the flip side, there needs to be a firm response when a PM shows no action or attempt to improve in response to new processes. Recognize and reward positive behavioral changes, and discipline and provide feedback when negative behavior is shown to send a clear message about PMs meeting expectations.

Leaders should also recognize that volatility is to be expected on a project, and it may or may not be in the PM’s control. Providing an environment where the PM is able to regularly discuss risks and issues in an open forum will help mitigate their fear of reporting problems, thus preventing the snowball effect of hidden problems going unanswered for lengthy amounts of time. Establishing a culture of open and honest communication and requiring self-driven and continuous improvement from PMs is a framework for developing future leaders and leaves a lasting impact on the organization.

Case Study, Part 3

“This is a waste of time.”

You risk losing momentum with certain PMs during the expectation adjustment period because their ‘wake-up’ call baseline assessment results seem too extreme for them to handle.

One PM in our pilot study was truly a model example of the potential for rapid improvement. This PM had never managed a project on his own, and had been reliant on an outside consultant to help with all his project management responsibilities prior to starting the Project Management Health Assessment. He was genuine in wanting to learn the project management criteria, however, he was inexperienced and had little guidance to get him to the point of self-sustaining project management.

The baseline assessment of his behavior was conducted by a third-party reviewer, providing realistic and honest feedback on his current state. This PM was agreeable and accepting of the less-than-optimal result of the review and vowed to change his behavior with guidance and coaching. The third-party reviewer worked with him to explain the defined criteria in the assessment and to provide actionable changes and tasks to the PM’s current project and deliverables. Continued review of documentation, assessments, and coaching allowed the PM to gradually make the necessary adjustments and changes needed to promote Best Practice behavior. The leadership team was open to listening to the PM’s risks and issues, worked through the mitigation to these issues and risks, and made decisions in a collaborative environment.

The PM graduated to a self-owned state of his project because of his ability to adapt and overcome the challenges of his inexperience, which was replaced with clear objectives and an understanding of best-practice project management behavior and expectations. He has been doing self-assessments for several months with a trigger reminder and, recently, with the reminder removed. He has fully ‘graduated’ to the self-assessment state in project management improvement and is delivering effective project results.

Key Points to Demanding Accountability

- A realistic baseline level of performance must be given if real improvement is to be made
- Improvements must be self-owned by the PM
- Creating a sustainable project management culture must be a leader-driven activity

Conclusion

The PM Health Assessment tools, training, and other aids referenced within the case study act as a model for how to grow effective project managers by changing PM behavior. The leadership team, peers, or outside parties empower the PMs to fulfill their duties as PMs, giving them knowledge and accountability to gain and maintain control of their projects and lead them effectively to completion.

In order to succeed, PMs need to have clear expectations from their leadership team and understand and accept the responsibilities they have for project management accountability. Leaders can do this by providing the guidance, coaching, mentoring, and knowledge needed to succeed, and by allowing mistakes and failures as guides and learning aids. These steps will lead the PMs to grow into the future leaders of the organization.

About the Author

Michael Lien is a consultant for Hitachi Consulting with more than three years' experience in the Aerospace & Defense industry. Mike specializes in supply chain strategy, project management, and Lean Six Sigma methodology. He works out of the Phoenix and Los Angeles areas and can be reached via telephone at 503.551.7978 or e-mail at mlien@hitachiconsulting.com

Betty Wan is a senior consultant for Hitachi Consulting. She has more than six years of experience in the Aerospace and Defense industry, specializing in software engineering process improvement, project management health assessment, governance, Six Sigma, and CMMI. Betty is based out of the Los Angeles area and can be reached via telephone: 213.443.7123 or e-mail at bwana@hitachiconsulting.com

Sara Howell is a manager in the Hitachi Consulting Aerospace and Defense Practice. She has more than eight years of experience in the Aerospace and Defense industry, specializing in IT implementations, organizational change management, and program excellence. Sara is based out of the Irvine area and can be reached via email at showell@hitachiconsulting.com

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